

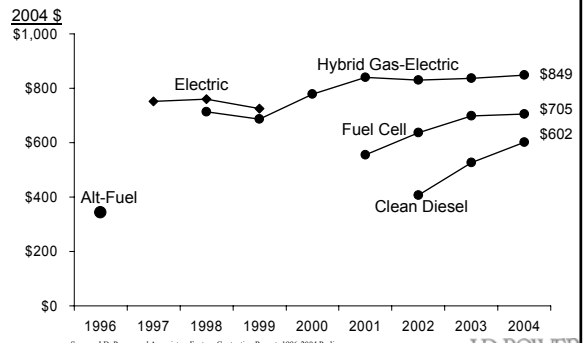
Do American drivers want alternative powertrains?

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What Consumers are "Willing to Pay" for Alternative Propulsion Technologies



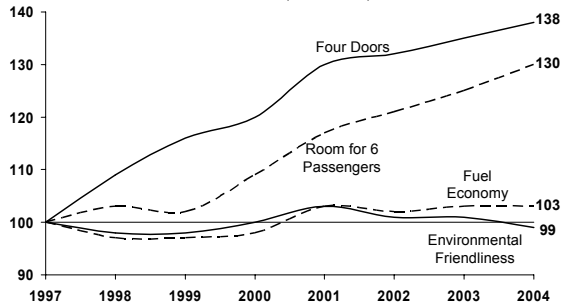
Source: J.D. Power and Associates, Feature Contenting Report, 1996-2004 Prelim.

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Trends in Importance Ratings by U.S. Consumers of Selected Attributes

Index Value (1997=100)

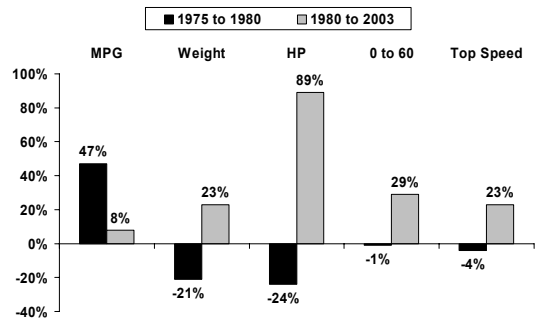


Source: J.D. Power and Associates, Automotive Performance, Execution, and Layout Study, 1997-2004 Prelim

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Improvement in Light Vehicle Engines

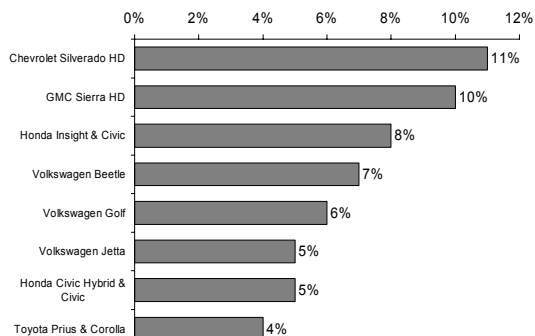


Source: U.S. EPA, Light-Duty Automotive Technology and Fuel Economy Trends: 1975 Through 2003, April 2003

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Engine Rating of Diesel or Hybrid versus Gasoline (Same or Comparable 2003 MY Vehicle, 90 Days Ownership)

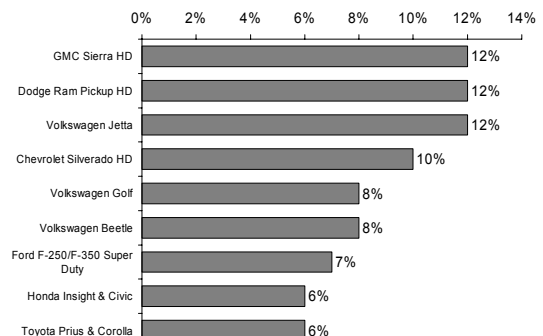


Source: J.D. Power and Associates, Automotive Performance, Execution, and Layout Study, 2003

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Engine Rating of Diesel or Hybrid versus Gasoline (Same or Comparable 2001 MY Vehicle, 3 Years Ownership)



Source: J.D. Power and Associates, Vehicle Dependability Study, 2004

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Consumers' Performance Expectations of Hybrid and Clean Diesel vs. Gasoline

	Hybrid-Electric Better than Gas in Feature		Clean Diesel Better than Gas in Feature	
	Currently Own		Currently Own	
	Gas	Hybrid	Gas	Diesel
Emissions/pollution levels vs. Gas	95%	99%	57%	48%
Fuel economy/efficiency vs. Gas	92%	99%	84%	75%
Performance (acceleration) vs. Gas	6%	22%	22%	33%
Power (torque) vs. Gas	5%	21%	59%	88%
Reliability/dependability vs. Gas	9%	46%	51%	82%

Note: The sample in column above is restricted to those who said they were familiar with the technology being rated.

Source: J.D. Power and Associates, Consumer Acceptance of Alternative Powertrains Study, 2004

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